



PENSION ADVANTAGE

Your number one supporter

Dear broker,

Welcome to our latest version of Pension Advantage and thank you for your continued support. Following on from issue 3, we are delighted to deliver our Self-Invested Fund enhancements to you.

We have been very busy enhancing our Self-Invested Fund stock-broking solutions in recent months. Much of the work done here is on the back of your feedback, which is critical to help us continually improve our range of product offerings. We trust this will help you retain valuable clients whilst also growing your pension income into the future.

For clients looking for control, choice and flexibility

The Self-Invested Fund offers a comprehensive range of pension investment solutions for your clients who are sophisticated investors, who are familiar with markets and trading and who understand the associated risks.

▶ [Watch our video on identifying opportunities with these clients](#)

Discretionary management

If your client wants a dedicated investment manager who will work alongside you as their financial planner, the discretionary managed service offered by Quilter Cheviot may well be an appropriate solution.

▶ [Watch the Quilter video](#)

Execution-only online trading

We partner with Platform Securities, part of FIS Global to provide an execution-only online trading facility and we have made some significant enhancements here recently. Through the online trading account you can now trade up to US market close. Our newly added fund centre provides your clients with access to independent investment tools and information from Morningstar on the wide range of funds, ETFs and investment trusts available on our platform

▶ [Watch our online trading video](#)

New range of support material

To support the growth of your pension activity and to assist in your conversations with high net worth clients we have updated our range of supporting material and collated these plus a range of support videos on our new SIF campaign page.

▶ [Visit the SIF campaign page](#)

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